

Created April 22, 2015

CHECKLIST FOR BECOMING A PURCHASING-CARDHOLDER (commonly known as P-Cardholder)

What Forms and Trainings are Required?

FORMS

- ☐ **Purchasing Card Application:** located on the [P-Card](#) webpage, the applicant must read and sign the Cardholder Agreement on pg. 1 as well as sign on pg. 2. Whatever information is entered within the Employee Information section on pg. 1 will be reflected on the cardholders account and physical P-Card. Authorization Limits should be set by [P-Card Coordinator](#) or Division Director. Please provide all additional signatures if possible. Once fully completed return to [P-Card team](#). Original form is preferred but is not required and can be sent in scanned or sent interoffice mail. The Purchasing Card Application is needed for ordering a P-Card, it is also kept on file by the P-Card Manager.
- ☐ **Agency Oracle EBS Access Request Form:** located on both the [Business Resource Center's](#) (BRC's) webpage and the P-Card webpage, the [Access Request Form](#) is needed, in part, to grant an employee user access/permissions. In addition to providing the BRC a completed Access Request Form, employees must attend required trainings. IMPORTANT: for those that aren't reconciling their own transactions, they **don't** need to fill out the Access Request Form, however they will need to be set up as a proxy. For information on setting up a user as a proxy please visit the BRC's webpage.

TRAININGS

- ☐ **Business Resource Center's iExpense Training:** The BRC and the P-Card team have collaborated to ensure P-Cardholders needing iExpense access receive full training. IMPORTANT: P-Cardholders who will be reconciling their own transactions must attend the BRC's iExpense training.

Both the BRC iExpense training and the P-Card training typically take place on the first Tuesday of every month. Please visit the [BRC's](#) webpage to view date and time of trainings. Registration for this training is available through [PeopleSoft](#) under Course No. 004509.

- ☐ **Purchasing Card Training:** Before being physically handed a P-Card employees must attend a P-Card training. Anyone is welcome to attend and does not need either of the forms mentioned above submitted before attending (although it is recommended). Each department has a P-Card Coordinator; employees seeking a P-Card should consult their department's Coordinator to assist with form submissions and training schedules.

Those who already have iExpense access/permissions or will not be reconciling their own P-Card transactions need to simply contact any member of the P-Card team to be added to training. The P-Card team will send an Outlook P-Card training invite upon processing P-Card Applications. Finally, the P-Card team will add employee's attendance from the training sign-in sheet to PeopleSoft, however, employees may register themselves under Course No. 004838.



Purchase Card Application Finance and Business Operations Division
Department of Executive Services
Procurement and Contract Services Section
Please return the original signed application to: P-Card Program Manager, Procurement and Contract Services, MS: CNK-ES-0340

Employee Information

Last Name	First Name	First Name
Department	Division	
Section	Business Address	
City	State	Zip Code
Business Phone Number	Email Address	

Authorization Limits

Please specify purchasing limits or standard default of \$20,000 monthly credit limit and \$5,000 single purchase limit will be applied to the card.

Monthly Credit Limit: _____ Single Transaction Limit: _____

Employee / Approval Signatures

Print Name / Title	Cardholder Signature	Date
Print Name / Title	Supervisor / Manager Signature	Date
Print Name / Title	Division Director Signature	Date
Print Name / Title	P-Card Dept. Coordinator Signature	Date

FOR OFFICIAL USE ONLY

Company	Department	Division
Name	Section	

AGENCY ORACLE EBS ACCESS REQUEST FORM Department of Executive Services
Business Resource Center
MS: 0320, 401, 4th Ave, Suite 600
Seattle, WA 98104
email: ebrc@kingcounty.gov

Use this form to request new user access, update security access for existing users, or to request access for an employee transferring into your agency.

To request access, please complete the Oracle EBS Access Request Form.

EBS USER INFORMATION

First Name	Last Name	Dept/Division
Employee #	Job Title	Request Date
Is this user a new King County employee?		
Is this user transferring to you from another King County agency?		
If you selected Yes, please complete the following fields:		
Transferring From	Effective Date	
Is this user a current employee with King County?		
If you selected Yes, please complete the Contractor Information Form and submit it with this form.		
Is this a request for a current user to receive revised access?		
If you selected Yes, please be sure to select new and related responsibilities below.		

NEW USER ACCESS

The user's responsibilities listed below are granted to all users. Users are responsible for completing the User Productivity Kit (UPK) which provides training.

AC AP Researcher	AC Assets Inquiry	AC Discoverer User
AC General Ledger Inquiry	AC Purchasing Inquiry	AC Reconciling Inquiry

APPROVER AND REVISION REASSIGNMENTS

Has changes to Approver access part of this request?	Yes	No
Has a Requisition been the county, transfer to another organization, or changes responsibilities, register transactions may need to be re-assigned.		
Is re-assignment of requisition transactions necessary as part of this request?	Yes	No
If re-assignment is required, please provide a brief description of the change in approval assignment and transfer to the appropriate user. A BRC Financial Analyst will contact the appropriate individual in your organization for more information and authorization.		

TRANSACTIONAL ACCESS - REQUIRES TRAINING

Please be sure to select all responsibilities needed, including new and related responsibilities below.

ACCOUNTS RECEIVABLE

AC AP Inquiry	AC AP Receipts	AC Accounts Payable
AC Accounts Payable	AC Accounts Payable	AC Accounts Payable

APPROVER

AC Discoverer Report Writer		
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FINANCIALS

AC Financial Asset Staff Only		
AC Financial Asset Staff Only		
AC Financial Asset Staff Only		
AC Financial Asset Staff Only		